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ABSTRACT

This document is part of a five-module training package to help employment and training service providers comply with the Workforce Investment Act (WIA) of 1998 and develop a one-stop training and employment services system. It consists of the participant workbook, trainer manual, and activity worksheets for a module on building a process for continuous improvement. The training manual presents a detailed lesson plan that includes step-by-step instructions for using the following tools and techniques to deliver the module: presenting overhead slides; having participants complete exercises; writing information on flip charts; using small group discussions; and using full group discussion. The workbook activities and worksheets are designed to achieve the following objectives: (1) show participants how to design and implement a continuous improvement process consisting of a cycle of four interrelated steps (plan, do, check, act) within a one-stop system; (2) teach participants to use various tools for identifying and analyzing performance problems; (3) teach participants to

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establish and support process improvement teams; (4) train participants to apply continuous improvement tools (including Pareto diagrams, run charts, scatter diagrams, and fishbone charts) to the collaboration process itself; and (5) have participants draw on the Malcolm Baldridge criteria and Simply Better resource materials. (MN)

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Partnering for Quality under the Workforce Investment Act: A Tool Kit for One-Stop System Building

Module 5: Building a Process for Continuous Improvement

Trainer Manual with Participant Workbook

Deborah Kogan, Vinz Koller, Richalene Kozumplik, and Mary Ann Lawrence

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Partnering for Quality under the Workforce Investment Act:

A Tool Kit for One-Stop System Building

Trainer Manual

(with Participant Workbook)

July 1999

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Partnering for Quality under the Workforce Investment Act:
A Tool Kit for One-Stop System Building

Module 5

Building a Process for Continuous Improvement

Trainer Manual

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Trainer Manual Guidelines

This manual provides a step-by-step approach to training on *Building a Process for Continuous Improvement* This session is the fifth in a series of five training modules designed to help local workforce development agencies collaborate to improve customer services. The complete curriculum on *Partnering for Quality under WIA* includes:

- Module 1. Reviewing System-Building Progress and Developing a Blueprint for WIA Transition
- Module 2. Partnering and Organizational Change
- Module 3. Collecting and Using Customer Feedback
- Module 4. Designing a System for the Delivery of Integrated Services
- Module 5. Building a Process for Continuous Improvement

Each module has a series of companion products. In addition to this trainer manual, products developed for Module 5. *Building a Process for Continuous Improvement* include overhead transparencies and a student workbook.

The best place to start with this guide is to read it through once. The guide is designed to be easy to understand. Following are points for reading and using the guide.

> Sentences typed in ***bold italics*** are intended to be said by the trainer to the group.
>
> - Sentences with a bullet in front of them are action items that the trainer needs to do.

Icons on the left hand side of the guide provide a visual view of the type of activity that is taking place. The Icon Key is provided below.

- Use overhead slide.

- Have participants complete exercise.

- Write information on flip chart.

- Use small group work/discussion.

- Use full group discussion.

Module 5. Building a Process for Continuous Improvement

- Write "Welcome" and your name and phone number on a flip chart at front of room prior to attendees arriving. Also include your e-mail address if you have one.

WELCOME! I'm glad you could be with us today.

- Introduce yourself and give a brief description of your background and qualifications to lead this training module.

- Put on title overhead for Module 5.

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Partnering for Quality under the Workforce Investment Act:
A Tool Kit for
One-Stop System Building

Module 5
BUILDING A PROCESS FOR CONTINUOUS IMPROVEMENT

This session will cover the material in your Participant Workbook under Module 5. Building a Process for Continuous Improvement.

- Have each person introduce themselves and state a *one word description* of their organization's continuous improvement process.

- Put on Overhead 5-2.

Reengineering Versus Continuous Improvement

How do we know which we should do?

5-2

Many business today talk about both "reengineering" and "continuous improvement." Are they both the same?

- Put on Overhead 5.3.

Reengineering Versus Continuous Improvement

Definition of Reengineering

"Reengineering is the fundamental rethinking and radical redesign of business processes to achieve dramatic improvements in critical, contemporary measures of performance, such as cost, quality, service, and speed."

Michael Hammer and James Champy

5-3

- Read the definition of reengineering. Highlight and stress the following key words: **fundamental rethinking**, **radical redesign**, **dramatic improvements**, **measures of performance**.

- Put on Overhead 5.4.

Reengineering Versus Continuous Improvement

Definition of Continuous Improvement

Continuous Improvement is the relentless, ongoing hunt to eliminate the sources of defects, inefficiencies, and nonconformance to customer specifications, needs, and expectations.

James Cortada and John Woods

5-4

- Read the definition of continuous improvement. Highlight and stress the following key words: **relentless**, **ongoing hunt**, **eliminate sources of defects**, **nonconformance to customer**.

- Put on Overhead 5-5.

Reengineering Versus Continuous Improvement

How Do They Differ?

Reengineering	Continuous Improvement
◆ **Replaces** one process with a completely new and different one that gives better/more efficient results.	◆ **Improves** a process over time so that it becomes more efficient and productive.
◆ Is a one-time event.	◆ Is an ongoing event.
◆ The process owner is highly involved.	◆ The process owner need be only mildly involved.

5-5

- Read the text. Highlight: **replaces** versus **improves**, **one-time** versus **ongoing**, **highly** versus **mildly**.

- Put on Overhead 5-6.

Reengineering Versus Continuous Improvement

When do you use each?

With a partner, discuss when an organization might utilize:

Reengineering	Continuous Improvement
–	–
–	–
–	–

5-6

- Have each attendee find a partner.
- Using the definitions just given, have each partner group discuss examples of when to use reengineering and when to use continuous improvement.

You can use Participant Workbook page 5.3 (with the reproduction of Overhead 5-6) to make notes.

- Set timer for five minutes.
- Once the time is up, have each partner group talk about at least one idea.

- Capture ideas on the flip chart.

- Put on Overhead 5.7.

Reengineering Versus Continuous Improvement

When Do You Use Each?

Reengineering	Continuous Improvement
• If the existing process cannot perform at the needed level. • If there are new changes or challenges to the system.	• If the existing process can be "tweaked" to meet ongoing, or gradually increasing expectations. • To stabilize and enhance an already effective process.

5-7

- Review the points on the overhead. Compare to the items listed by the partner groups.

- Put on Overhead 5.8.

Reengineering Versus Continuous Improvement

What are the Similarities?

With a partner, discuss what reengineering and continuous improvement have in common:

-
-
-
-

5-8

- Have each attendee find a different partner.

You will now have five minutes to identify what reengineering and continuous improvement have in common.

List your ideas on Participant Workbook page 5.3 (which

reproduces Overhead 5-8).

- Set the timer for 5 minutes.
- When the time is up, get each partner group to identify one similarity they identified.

- Capture ideas on the flip chart.

- Put on Overhead 5.9.

Reengineering Versus Continuous Improvement

What Are Both Trying To Achieve?

- Correct a disparity between current reality and customer's stated expectations.
- Streamline the process to eliminate non-value-added work.
- Meet specific requirements of cost, quality, service, and speed.

5-9

- Review the similarities identified on the overhead. Compare these with the ideas captured on the flip chart from the partner groups.
- State that the Workforce Investment Act has many references to implementing "continuous improvement" as well as to the "creation of a system."

In Module 4, we described how to reengineer a One-Stop system to deliver seamless services that respond to customer requirements.

Module 5 describes how to implement a continuous improvement process for a One-Stop system with multiple partners.

- Have each person describe one thing that they would like to learn in this session. Record on flip chart and hang around the room to return to throughout the session.

- Put on Overhead 5-10.

Two Aspects to Implementing Continuous Improvement

- Organizational/Corporate Culture Changes
- Logistics/Techniques

5-10

- Review points on slide 5-10
- Explain that we will be focusing on the organizational aspects first and then review and practice logistics and techniques.

- Put on Overhead 5-11.

Learning Objectives

- Learn when it is appropriate to use continuous improvement tools.
- Learn about the continuous improvement process.
- Learn when and how to implement continuous improvement within a One-Stop system.

5-11

- Review the learning objectives. Compare them to the stated requests of the participants.

- Put on Overheads 5-12 and 5-13.

Agenda

- How Process Reengineering and Continuous Improvement Differ.
- A System, a Process, and an Activity.
- Current Approach to Improving Services.
- Stages of Dynamic Process Improvement.

5-12

Agenda
Continued

- Details of Plan-Do-Check-Act cycle.
- Organizational Aspects of Continuous Improvement:
  - New Roles and Skills for Staff and Managers.
  - Forming Continuous Improvement Teams.

5-13

- Review the agenda items to the stated requests of the participants and where we are currently on the agenda.
- Show that the next step on the agenda is talking about the difference between an activity, a process, and a system and how those fit into the continuous improvement process.

- Put on Overhead 5-14.

Organizational Aspects of Continuous Improvement

- Implementing continuous improvement in the One-Stop setting requires:
  - Developing new roles and new skills for staff and managers.
  - Forming teams that represent all partners and processes within the One-Stop system.
  - Using effective teamwork.

5-14

Up to now, we have been focusing on the logistics of continuous improvement.

It is also important to focus on the organizational aspects of

implementing continuous improvement within a One-Stop setting. There are three organizational requirements of continuous improvement: (1) developing new roles and skills for all staff; (2) forming continuous improvement teams, and (3) using effective teamwork within those teams.

- Put on Overhead 5-15.

Developing New Roles and Skills for Staff and Managers

- Human Organizational Chart.
- Traditional organization versus learning organization.

5-15

- Ask for volunteers. Tell the attendees that you will not require the volunteers to sing, dance or even speak; you will just need them to stand in place.
- First, ask for a person to volunteer to be a director of a One-Stop center. Tell them that this will be the only time that they will be able to be a director and not have to do any work!
- Once a volunteer comes forward, place him/her at the front of the room facing the attendees.
- Next ask for 2 volunteers to be assistant directors. Again state that they will not be required to do anything, but that you just need them to stand where you place them.
- Once the volunteers come forward, place them in front of the director, side by side facing the director.

- Next ask for 3 or 4 volunteers to come forward and be managers.

- Once they come forward, place them directly behind the 2 assistant directors, right behind the backs of the assistant directors, side by side and facing the director.

- Next ask for 5 or so volunteers to be front-line staff. Place these volunteers in a line (side by side), directly behind the managers but facing the director.

- Next ask attendees what customers are served by the One-Stop center.

- Probe for specific answers such as youth, offenders, dislocated workers, people looking for better jobs, under-employmed, unemployed, UI recipients, welfare recipients, students, veterans, disabled individuals, employers, etc.

- For each customer identified, have a person volunteer to represent that kind of customer. Have them line up/cluster behind the front-line staff.

- Once all the customers and staff have been represented, tell the attendees that this is a typical organizational chart of a traditional organization.

- Ask the director:

  Can you see the customers?

- If he/she says "yes" ask them if they can see each and every customer. When they respond "no," ask:

  Who usually makes all the decisions in a traditional organization?

- When attendees respond that the director makes all the

decisions, discuss how hard it would be to determine what is right for each of the customers when the Director cannot even see all the customers for whom s/he is making those decisions. Then ask:

Who knows best what each customer needs?

- If they state that the customer knows best, ask:

Who knows second best?

- The attendees will respond that the front-line staff do. Discuss how hard it is to see the needs of the customer with their backs to them.

- Have the front-line staff turn around to face the customers. Then talk about how hard it is to turn your back on your supervisor in order to face your customer. Ask:

Who can help the front-line staff person when s/he runs into organizational barriers?

- Once the attendees identify the managers, have the managers turn around to support the front-line staff.

- Continue this questioning until all staff have turned around to face the direct customer.

- Discuss who is the direct customer of staff in each job title.

- Once the have all turned around, say that this an organizational chart of a high performing/learning organization.

- Put on Overhead 5-16.

Developing New Roles and Skills for Staff and Managers

Activity: Identify New Roles

- *With a partner, review the :*
  - *Human Organizational Chart*
- *Identify the new roles for staff and managers within One-Stop Centers* (5 minutes).
- *Record findings on Activity Worksheet 5-A.*

5-16

- Review the instructions for the activity.

- Put on Overhead 5-17.

New Staff and Manager Roles
(Activity Worksheet 5-A)

New "Staff" Roles	New "Manager" Roles
◆	◆
◆	◆
◆	◆
◆	◆
◆	◆
◆	◆
◆	◆

5-17

- Help the attendees find Activity Worksheet 5-E.
- Set the timer for 5 minutes.
- At the end of 5 minutes, ask for volunteers to describe one of the new roles they identified for staff or managers.

- Capture ideas from each partner team on a flip chart.

- Put on Overhead 5-18.

Developing New Roles and Skills for Staff and Managers

Activity: Identify New Skills

- *With the same partner, identify the new skills needed by staff and managers within One-Stop Centers* (5 minutes).
- *Record findings on Activity Worksheet 5-B.*

5-18

- Review the instructions.

- Put on Overhead 5-19.

New Staff and Manager Skills
(Activity Worksheet 5-B)

New "Staff" Skills	New "Manager" Skills
◆	◆
◆	◆
◆	◆
◆	◆
◆	◆
◆	◆
◆	◆

5-19

- Help the attendees find Activity Worksheet 5-F.
- Set the timer for 5 minutes.
- At the end of 5 minutes, ask for volunteers to describe one of the new skills that staff or managers need.

- Capture ideas from each partner team on a flip chart. Then ask:

How are each of your One-Stop systems helping to build these new skills and prepare staff and managers for their new roles?

- Put on Overhead 5-20.

Choosing Processes to Improve

Criteria to Select High Priority Topics

- Needs attention (customer window).
- Has high customer value (customer window).
- Is cross functional.
- Impacts multiple funding sources.
- Impacts external customer.
- Can provide a quick win, especially if first experience using teams.

5-20

Now that we know the process for continuous improvement, we must learn how to choose what process to improve. Many organizations use the criteria outlined on this overhead.

Review the criteria from Overhead 5-20.

- Put on Overhead 5-21.

Choosing Processes to Improve

Activity: Select Topics for Team Problem Solving

- *Find a partner.*
- *Applying the selection criteria just described, spend 5 minutes to identify 3 topics that could be selected for team problem solving.*
- *Record findings on Activity Worksheet 5-C.*
- *Report out.*

5-21

- Review instructions.
- Set timer for 5 minutes.
- After time is up, have partner groups report out their conclusions.

- Capture ideas on a flip chart.

- Put on Overhead 5-22.

Forming Continuous Improvement Teams

Criteria to Select Team Members

- Cross functional representation.
- Cross site representation.
- Multiple funding sources represented.
- Participants with different learning styles.
- No known conflicts/enemies among members.

5-22

It is important to establish teams that will be able to work together well to complete their tasks. Teams must be composed of a variety of individuals that collectively bring the skills and knowledge that the team needs.

- Review the criteria to use to select well-balanced and representative teams

- Put on Overhead 5-23.

Forming Continuous Improvement Teams
Continued

Criteria to Select Team, **Continued**

- Participation by at least one expert in team processes and continuous improvement tools.
- Participation by at least one expert in the content of the processes to be reviewed.
- Manageable number of team participants (8-10 total).

5-23

- Review the criteria continued on this overhead.

- Put on Overhead 5-24.

Forming Continuous Improvement Teams

Activity: Select a Team

- *In this exercise, job referral and job placement services ("helping customers find a job") have been identified as the topic for a local improvement team.*
- *Using the criteria, determine the 8-10 members that you will charter for this team. Record the selected members on Activity Worksheet 5-D.*

5-24

- Review the instructions for this activity.
- Have individuals work with the members of their local One-Stop partnership.

- Put on Overhead 5-25.

Select a Team
(Activity Worksheet 5-D)

Name	Agency	Source of Funding	Site	Learning Style

5-25

This is the worksheet that you will be using to complete this activity.

- Set the timer for 5 minutes.
- Once the time has elapsed, have each team describe their

teams to the large group.

- Compare the suggested membership of the teams against the criteria for establishing team members.

- Put on Overhead 5-26.

Forming Continuous Improvement Teams

Ways to Notify Selected Members

Effective	Ineffective
• Coach asks	• Coach dictates
• Team member(s) ask	• Team dictates
• CEO asks	• CEO dictates

5-26

- Point out the various ways to notify selected members. Point out that the invitation can be extended by various parties, but—to be effective—members should be **asked** and not **told** to be a member.

- Put on Overhead 5-27.

Forming Continuous Improvement Teams

Examples of Ways to Notify Selected Members

- "Join your Center's team to design an improved job referral process."
- "You have been asked to participate on a team to *revise* the *job referral process* in your One-Stop Center."

5-27

- Review the approaches described on the overhead. Ask:

Do you think these would be effective approaches?

- Ask how the One-Stop systems represented in the room have notified potential members of their continuous improvement teams. Ask if it proved to be an effective approach. If not, what might have helped to make it more effective.

- Put on Overhead 5-28.

Forming Continuous Improvement Teams

Establishing Team Parameters

- Provided by the group granting the authority to the team.
- Done through a team "charter."

5-28

It is important to establish parameters within which a continuous improvement team may operate. Establishing the

parameters helps to define the work of the teams and enables them to begin their work more quickly.

- Put on Overhead 5-29.

Forming Continuous Improvement Teams

Using Team Charters

Parameters Specified by Charterers

- Team topic title.
- Objective.
- Expectations (outcomes of deliverables).
- Guidelines to achieve expectations.
- Boundaries of authority.
- Resources available to accomplish tasks.
- Skills required (of process owner, members, leader, facilitator).

5-29

- Review each point on the overhead.
- Stress that these will be completed by the chartering group or person.

The TEAM TOPIC TITLE should represent the general topic of the work to be done.

The OBJECTIVE of the team should describe in general what the team is expected to accomplish. An example would be: "to develop a process to provide quick, relevant job referrals that meets the needs of employers and job applicants."

EXPECTATIONS would include specific deliverables for the team to complete. Examples might include: a basic flow chart of the process, the identification of customer requirements and standards for both job applicants and employers, the identification of methods to streamline the process, new staff orientation of the process, and staff training on any new

methods that are tested, implemented, and standardized.

***GUIDELINES** may include any federal, state, or local laws, regulations, or policies, and benchmark information from outside the organization.*

***BOUNDARIES** of authority express the authority of the team to make decisions, make recommendations, or provide basic input.*

***RESOURCES AVAILABLE** that are specified in a team charter may include human or financial resources, equipment, books/materials or supplies, or time to be specifically applied to the designated task.*

***SKILLS REQUIRED** may include the designation of a person or persons to be the leader or facilitator of the team, assistance of a process owner, or additional training that will be available to the team.*

- Put on Overhead 5-30.

Forming Continuous Improvement Teams

Using Charters

Parameters Specified by Team

- Meeting time and place.
- Ground rules.
- Operating procedures.
- Next steps.
- Additional resources needed.

5-30

- Review each point on the overhead.
- Stress that each of these will be determined by the team

members.

- Remind the attendees that these are all parts of the process to help teams complete the initial "forming" stage we referred to in Module 1.

- Put on Overhead 5-31.

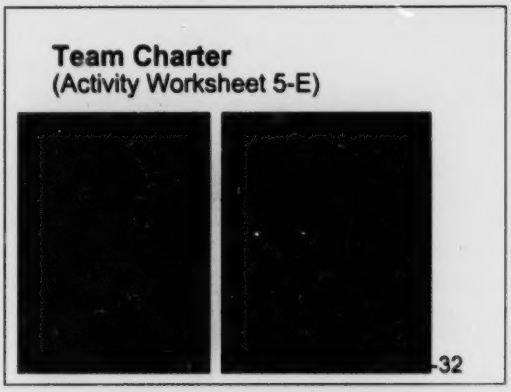
Activity: Practice Establishing Team Parameters

- *Working in your Center teams, determine the team parameters that you will give to your "job referral process" team* (15 minutes).
- *Complete parts 1 through 6 of the Team Charter format found in Activity Worksheet 5-E.*
- *Report out.*

5-31

- Review the instructions for this activity.
- Focus the work around the job referral process.

- Put on Overhead 5-32.



In this exercise you will be completing the parameters for a continuous improvement team on the job referral process. This overhead illustrates Activity Worksheet 5-H that you will be using during the exercise.

- Set the timer for 15 minutes.
- At the end of this time period, have a representative from each team report on their progress.

- To transition into the next concept of the components of a system, ask the attendees as a group to state a definition of:

  Activity

  Process

  System

- Once they have discussed these concepts, put on Overhead 5-33.

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Components of a System

- ***Activity***: Steps or tasks in the execution of a process.
- ***Process***: A series of interrelated activities that lead to a desired outcome.
- ***System***: A set of interrelated and interdependent processes that are managed and have a specific purpose.

5-33

- Reward them for ideas that are similar to the definitions on the overhead.

These concepts are key to the continuous improvement process.

- Put on Overhead 5-34.

Components of a System

Key Elements of a Process

- Has distinct start and end points.
- Takes inputs, transforms/adds value to them, and delivers output to internal or external customer.
- Includes actions that are:
  - Definable
  - Predictable
  - Repeatable
  - Measurable
- Fulfills a specific purpose that adds value for a customer.

5-34

- Describe how **activities** can become a **process** by meeting the listed criteria.

- Review examples of processes on flip chart (from Ken Miller).
- Example of Process from Food Processing Business

Vendor/supplier:	***farmer***
Input:	***tomatoes***
Organization:	***manufacturer***
Value added:	***remove seeds, add water and spices, can it***
Customer:	***wholesaler***
Outcome:	***more variety for customer/profit for manufacturer***

- Example of Process from Workforce Development System

Vendor/supplier:	***employer***
Input:	***job order***
Organization:	***staff***
Value added:	***job match***
Customer:	***job applicant***
Outcome:	***job interview for applicant; "tick***

mark" for staff

- Put on Overhead 5-35.

Components of a System

One Stop System Components

At your tables, identify as many examples as possible of your One Stop's:

- *Activities.*
- *Processes.*
- *Systems.*

Report out.

5-35

- Review instructions for exercise that attendees will complete in a small group (at their own table).
- Set timer for 5 minutes.

- Once time is up, get each table to describe some of its examples for each of the 3 categories. Record on flip chart.
- Discuss to ensure consensus and understanding of the three terms.

- Put on Overhead 5-36.

Document Your Current Approach to Improving One-Stop Services

- *Individually answer the questions on Activity Worksheet 5-F* (5 minutes).
- *Working with your One-Stop team, come to consensus on each answer* (15 minutes).
- *Draw a picture indicating the effectiveness of this approach to improving One-Stop Services* (5 minutes).
- *Report out.*

5-36

- Display each instruction as needed.
- Help attendees to locate Activity Worksheet 5-A.
- Present the first instruction, explaining that each individual will have five minutes to answer the questions on the worksheet. .Set the timer for 5 minutes.

- As attendees start to work, put on Overhead 5-37, which summarizes the four questions to be addressed .

Document Your Current Approach to Improving One-Stop Services
(Questions Covered on Activity Worksheet 5-F)

1. How does your One-Stop center or system (or your program) measure success?
2. How does your One-Stop center or system (or your program) identify issues/problems?
3. How is a specific problem solved?
4. How are decisions made in the One-Stop center/system (or your program)?

5-37

- Return to Overhead 5-36. Present the second instruction, explaining that attendees should come together within their

local One-Stop teams for the second activity.

- Present Overhead 5-37 again, displaying the 4 questions to be addressed by each team. Set the timer for 10 minutes.
- After 10 minutes, check with the teams to see if they need additional time. Add time as needed.
- Return to Overhead 5-36. Present the third instruction, explaining that each team is now supposed to draw a picture indicating the effectiveness of their approach to making improvements.
- Hand out flip chart paper and markers to each team. Set the timer for 5 minutes.
- Once the time is up, have each team share their drawing with the large group..

What do management experts say is a sound method for improving processes?

- State that we will next present one sound method for continuous process improvement, called DPI (dynamic process improvement).

- Put on Overhead 5-38.

Dynamic Process Improvement Method or DPI

- Outlined by Bill Montgomery in the book *Power Up Teams*.
- Developed by studying the natural stages that teams use to describe and streamline work flows.
- Simple to understand and use.
- Generic: learn the stages of DPI and all other continuous improvement methods fit into this one.

5-38

- Review all points on the overhead.

- Put on Overhead 5-39.

Document Your Current Approach to Improving One-Stop Services (Questions Covered on Activity Worksheet 5-F)

1. How does your One-Stop center or system (or your program) measure success?
2. How does your One-Stop center or system (or your program) identify issues/problems?
3. How is a specific problem solved?
4. How are decisions made in the One-Stop center/system (or your program)?

5-39

- Review each stage, as follows:

Scope: Determine the process, its boundaries, members, and owner(s).

Flow: Describe the process, its inefficiencies and bottlenecks; determine what information you might need to collect.

Customer/Supplier: Determine customer requirements and requirements for inputs from suppliers.

Issues: Collect, display, and analyze data so that you can determine problems, opportunities for improvement, and select an issue to address.

Cause: Determine possible causes, verify with data, identify the root cause. (Note: tell Ritz Carlton Story)

Solution: Generate possible solutions, run a test, implement the solution and standardize the process.

- After you review each stage in the continuous improvement process, stress that the process is considered dynamic because you learn and take action at each stage.

- Put on Overhead 5-40.

Document Your Current Approach to Improving One-Stop Services
(Questions Covered on Activity Worksheet 5-F)

1. How does your One-Stop center or system (or your program) measure success?
2. How does your One-Stop center or system (or your program) identify issues/problems?
3. How is a specific problem solved?
4. How are decisions made in the One-Stop center/system (or your program)?

5-40

You can return to any stage as you learn more information. Returning to a previous stage is positive, because it means you have learned more and are ready to improve on your previous solution.

- Put on Overhead 5-41.

> Document Your Current Approach to Improving One-Stop Services (Questions Covered on Activity Worksheet 5-F)
>
> 1. How does your One-Stop center or system (or your program) measure success?
> 2. How does your One-Stop center or system (or your program) identify issues/problems?
> 3. How is a specific problem solved?
> 4. How are decisions made in the One-Stop center/system (or your program)?
>
> 5-41

- Review each point on the overhead.

- Put on Overhead 5-42.

> Document Your Current Approach to Improving One-Stop Services (Questions Covered on Activity Worksheet 5-F)
>
> 1. How does your One-Stop center or system (or your program) measure success?
> 2. How does your One-Stop center or system (or your program) identify issues/problems?
> 3. How is a specific problem solved?
> 4. How are decisions made in the One-Stop center/system (or your program)?
>
> 5-42

In the next activity you will practice identifying different stages in the continuous improvement process. You will work with a partner at your table or with your whole table.

- Review the instructions.

- Put on Overhead 5-43.

> Document Your Current Approach to Improving One-Stop Services
> (Questions Covered on Activity Worksheet 5-F)
>
> 1. How does your One-Stop center or system (or your program) measure success?
> 2. How does your One-Stop center or system (or your program) identify issues/problems?
> 3. How is a specific problem solved?
> 4. How are decisions made in the One-Stop center/system (or your program)?
>
> 5-43

Look for Activity Worksheet 5-B in your workbook. It looks like the image on this overhead slide.

- Set the timer for 10 minutes.
- When the time is up, ask for volunteers to give their answers to each scenario.
- Discuss and come to consensus on correct answers.

- Put on Overhead 5-44.

Document Your Current Approach to Improving One-Stop Services
(Questions Covered on Activity Worksheet 5-F)

1. How does your One-Stop center or system (or your program) measure success?
2. How does your One-Stop center or system (or your program) identify issues/problems?
3. How is a specific problem solved?
4. How are decisions made in the One-Stop center/system (or your program)?

5-44

- Put on Overhead 5-45.

Dynamic Process Improvement Method or DPI

Stages of Dynamic Process Improvement

- Stage 1 - Scope
- Stage 2 - Flow
- Stage 3 - Customer/Supplier
- Stage 4 - Issues
- Stage 5 - Cause
- Stage 6 - Solution

5-45

- Review the overhead points one at a time.

- State the following rules for this small group activity. Make sure that the rules are also listed on a flip chart.

Divide into 4 teams. Members of each team should stand up and move into a corner of the room. Form a circle with your team members, but be sure that you are at least six feet away from the other members of your team.

You will be asked to perform a process by throwing materials to

a team member after they have been thrown to you. You will be collecting the following data from each of the repetitions of this process:

> ***Cycle time. How long it takes for the material to be thrown from the first to the last person in the team.***
>
> ***Number and types of errors.***
>
> ***Length of time.***

Once we have gathered this data, we will learn how to analyze and utilize it continuously to improve our process.

- Distribute stop watches, some materials to be thrown, and flip chart pages to record the data.
- Have each team do a trial run.
- Then begin to collect the data.
- Once the data are collected, distribute the information on each of the tools.
- Have each team complete the tools using the data they have collected.

- Have each team report its findings.

- Put on Overhead 5-46.

How many of you have heard of the Plan-Do-Check-Act cycle?

This cycle clusters the six stages of Dynamic Process Improvement (DPI) into 4 steps.

Dynamic Process Improvement Method or DPI

Stages of Dynamic Process Improvement, Continued

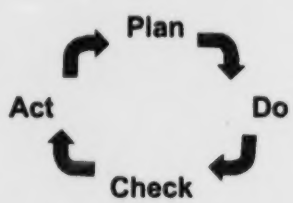
- Six **stages** (not steps): going back is appropriate if it enhances going forward.
  - Stage = a place to be.
  - Step = continual progression.
- Stages are dynamic: you learn and take action at each stage.
- You may return to any stage: returning is a positive thing.

5-46

- Review the points on the overhead.

- Put on Overhead 5-47.

Steps in Improving Processes



5-47

- Review the cycle. Show how one completion of the cycle leads to the beginning of the next cycle.

- Put on Overhead 5-48.

Steps in Improving Processes

"Plan"

- Select problem or process.
- Describe the process flow.
- Describe various causes and identify the root cause.
- Develop a solution.

5-48

- Review the points. Discuss how the different stages of Dynamic Process Improvement (DPI) fit into the "Plan" step.

- Put on Overhead 5-49.

Steps in Improving Processes

Typical Tools Used in "Plan" Step

Activity	Typical Tools
• Select problem or process.	• Brain storming, affinity diagram, data displays.
• Describe the process flow.	• Column or basic flow chart, tree diagram.

Described in *Power Up Teams* by Bill Montgomery

5-49

- Review the points shown on the overhead.

- Put on Overhead 5-50.

Steps in Improving Processes

Typical Tools Used in "Plan" Step, Continued

Activity	Typical Tools
• Describe various causes; identify the root cause.	• Affinity diagram, cause and effect diagram, inter-relationship digraph, data displays.
• Develop a solution.	• Flow charts, activity network diagram, prioritization matrix, matrix diagram, tree diagram.

Described in *Power Up Teams* by Bill Montgomery.

5-50

- Review the points shown on the overhead.

- Put on Overhead 5-51.

Steps in Improving Processes

Typical Tools Used in "Do" Step

Activity	Typical Tools
• Implement the solution.	• Flow charts, activity network diagram, data displays.

Described in *Power Up Teams* by Bill Montgomery.

5-51

- Review each of the points shown on the overhead.

- Put on Overhead 5-52.

Steps in Improving Processes

Typical Tools Used in "Check" Step

Activity	Typical Tools
• Evaluate the solution.	• Check sheets, data displays, flow charts.

Described in *Power Up Teams* by Bill Montgomery.

5-52

- Review the points shown on the overhead.

- Put on Overhead 5-53.

Steps in Improving Processes

Typical Tools Used in "Act" Step

Activity	Typical Tools
• Reflect and act on learning to stabilize system at improved level or make new changes.	• Affinity diagram, radar chart, brainstorming.

Described in *Power Up Teams* by Bill Montgomery.

5-53

- Review the points shown on the overhead.

- Put on Overhead 5-54.

One-Stop Continuous Improvement Case Study

- *Working with your table, read the case study that is handed out to you.*
- *Determine key points about the case study.*
- *Prepare a presentation about those key points.*
- *Report out.*

5-54

- Review instructions.
- Distribute the case study materials.
- Set the timer for 10 minutes.

- Put on Overhead 5-55.

Continuous Improvement Case Study

Debriefing

- How was continuous improvement utilized?
- What lessons were learned?
- What worked well?
- What were the "pitfalls"?
- What support was given? By whom?
- What needed improvement in using the continuous improvement process?
- What similarities did you find among all case studies?
- What was unique to each?

5-55

- Utilize the questions on the overhead to prompt discussion about how the organization learned from its continuous improvement activities.

- Put on Overhead 5-56.

Summary: Using Continuous Improvement in a One-Stop System

- Focus on understanding and improving *internal* and *external* customer processes.
- Focus on One Stop *collaborative* process.
- Use with a newly reengineered process to keep it current.

5-56

- Review each point. Discuss how continuous improvement can be used for internal processes within the One-Stop such as procurement, job referrals, training referrals, job matching, etc.

- Indicate that continuous improvement can also be a powerful tool to improve the collaboration process among the One-Stop partners.

- Describe how to use the continuous improvement process to continue to upgrade a process that was recently reengineered. This keeps the organization surprising and delighting the customers.

- Put on Overhead 5-57.

Activity: Using Continuous Improvement in Your One-Stop

- *Discuss how your local One-Stop team can use continuous improvement approaches and tools to make your operations more effective and efficient.*
- *Determine your next steps to implement continuous improvement in your One-Stop system.*
- *Report out.*

5-57

- Divide into One-Stop teams.
- Review instructions.
- Set timer for 2 minutes.
- Have groups report out.

- Put on Overhead 5-58.

Homework Assignments

5-58

We have designed two "homework" assignments to help your local One-Stop partnership practice and apply the ideas presented in this session.

Assignment #1 is designed to help you begin the process of continuous improvement within your One-Stop system by selecting three issues and chartering three teams.

Assignment #2 is designed to help you identify barriers that may impede the successful implementation of a continuous improvement process.

- Put on Overhead 5-59.

Assignment 1

- Review and analyze your One Stop's current customer data.
- Select 3 processes for continuous improvement.
- Charter 3 teams.
- Begin team continuous improvement activities.
- Bring team progress information to next meeting.

5-59

- Review all the points in Assignment 1. Make sure attendees understand the assignment.

- Put on Overhead 5-60.

Assignment 2

- Begin continuous improvement activities within your One-Stop center/system.
- Identify obstacles in your current management structure that inhibit effective continuous improvement practices in your One-Stop.
- Bring a description of these obstacles to the next training session.

5-60

- Review all the points in Assignment 2. Make sure attendees understand the assignment.
- If the team will be proceeding with Module 6, develop an action plan for implementing a continuous improvement process and addressing the organizational issues raised by such a process.
- If the session on Module 6 will occur before any new processes can be implemented, have the team brainstorm how they would want their One-Stop management structure to support the implementation of continuous improvement efforts.

- Put on Overhead 5-61.

Techniques and Tools

Resource Tool Kit

5-61

The Tool Kit at the end of the Participant Workbook summarizes the process and continuous improvement tools that have been discussed in this and other sessions.

- Put on Overheads 5-62, 5-63, and 5-64. Review the tools covered in this session.

There is a large literature on the tools used in continuous improvement. We have included references to some useful resource materials in the Tool Kit. Ask the trainers for more information about a specific tool.

Tools Referred to in Module 5

- Affinity diagram
- Activity network diagram
- Basic data display tools:
  - Bar chart
  - Pareto Diagram
  - Pie chart
  - Run chart
  - Radar chart
  - Histogram

5-62

Tools Referred to in Module 5

Continued

- Brainstorming
- Cause and effect diagram
- Check sheets
- Customer-process-supplier model
- Flow Charts
  - Basic flow chart
  - Column flow chart
  - Analysis tools for flow charts

5-63

Tools Referred to in Module 5
Continued

- Decision matrix
- Interviews
- Matrix diagram
- Planning sheet
- Prioritization matrix
- Requirements matrix
- Tree diagram

5-64

SPR SOCIAL POLICY RESEARCH ASSOCIATES

Partnering for Quality under the Workforce Investment Act:
A Tool Kit for One-Stop System Building

Module 5

Building a Process for Continuous Improvement

Participant Workbook

200 Middlefield Road, Suite 100
Menlo Park, CA 94025
Phone (650) 617-8625/Fax (650) 617-8630

CEOF2601

SPR SOCIAL POLICY RESEARCH ASSOCIATES

Partnering for Quality under the Workforce Investment Act:
A Tool Kit for One-Stop System Building

Module 5
BUILDING A PROCESS FOR CONTINUOUS IMPROVEMENT

Reengineering Versus Continuous Improvement

How do we know which we should do?

5-2

Reengineering Versus Continuous Improvement

Definition of Reengineering

"Reengineering is the fundamental rethinking and radical redesign of business processes to achieve dramatic improvements in critical, contemporary measures of performance, such as cost, quality, service, and speed."

Michael Hammer and James Champy

5-3

Reengineering Versus Continuous Improvement

Definition of Continuous Improvement

Continuous Improvement is the relentless, ongoing hunt to eliminate the sources of defects, inefficiencies, and nonconformance to customer specifications, needs, and expectations.

James Cortada and John Woods

5-4

Reengineering Versus Continuous Improvement

How Do They Differ?

Reengineering	Continuous Improvement
• **Replaces** one process with a completely new and different one that gives better/more efficient results.	• **Improves** a process over time so that it becomes more efficient and productive.
• Is a one-time event.	• Is an ongoing event.
• The process owner is highly involved.	• The process owner need be only mildly involved.

5-5

Reengineering Versus Continuous Improvement

When do you use each?

With a partner, discuss when an organization might utilize:

Reengineering	Continuous Improvement
–	–
–	–
–	–

5-6

Reengineering Versus Continuous Improvement

When Do You Use Each?

Reengineering	Continuous Improvement
• If the existing process cannot perform at the needed level.	• If the existing process can be "tweaked" to meet ongoing, or gradually increasing expectations.
• If there are new changes or challenges to the system.	• To stabilize and enhance an already effective process.

5-7

Reengineering Versus Continuous Improvement

What are the Similarities?

With a partner, discuss what reengineering and continuous improvement have in common:

-
-
-
-

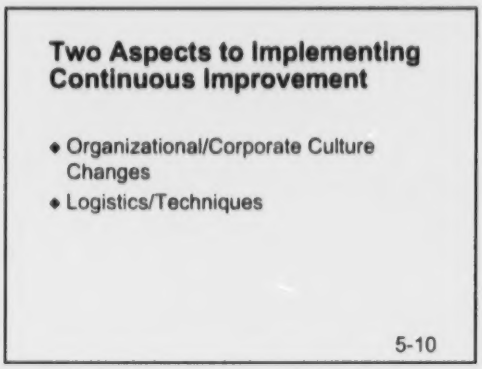
5-8

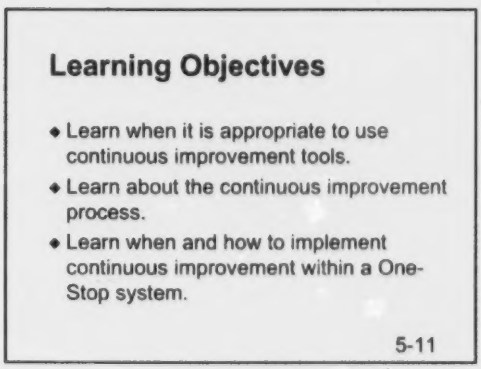
Reengineering Versus Continuous Improvement

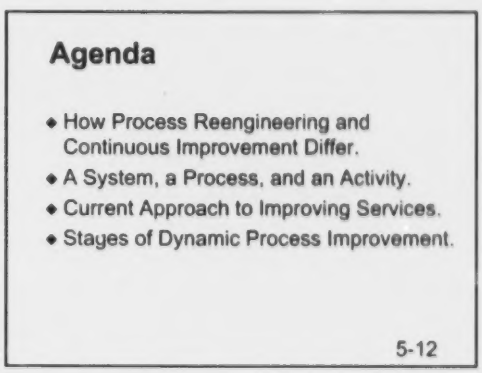
What Are Both Trying To Achieve?

- Correct a disparity between current reality and customer's stated expectations.
- Streamline the process to eliminate non-value-added work.
- Meet specific requirements of cost, quality, service, and speed.

5-9


Two Aspects to Implementing Continuous Improvement
• Organizational/Corporate Culture Changes
• Logistics/Techniques
5-10


Learning Objectives
• Learn when it is appropriate to use continuous improvement tools.
• Learn about the continuous improvement process.
• Learn when and how to implement continuous improvement within a One-Stop system.
5-11


Agenda
• How Process Reengineering and Continuous Improvement Differ.
• A System, a Process, and an Activity.
• Current Approach to Improving Services.
• Stages of Dynamic Process Improvement.
5-12

Agenda
Continued

- Details of Plan-Do-Check-Act cycle.
- Organizational Aspects of Continuous Improvement:
  - New Roles and Skills for Staff and Managers.
  - Forming Continuous Improvement Teams.

5-13

Organizational Aspects of Continuous Improvement

- Implementing continuous improvement in the One-Stop setting requires:
  - Developing new roles and new skills for staff and managers.
  - Forming teams that represent all partners and processes within the One-Stop system.
  - Using effective teamwork.

5-14

Developing New Roles and Skills for Staff and Managers

- Human Organizational Chart.
- Traditional organization versus learning organization.

5-15

Developing New Roles and Skills for Staff and Managers

Activity: Identify New Roles

- *With a partner, review the :*
  - *Human Organizational Chart*
- *Identify the new roles for staff and managers within One-Stop Centers* (5 minutes).
- *Record findings on Activity Worksheet 5-A.*

5-16

New Staff and Manager Roles
(Activity Worksheet 5-A)

New "Staff" Roles	New "Manager" Roles
◆	◆
◆	◆
◆	◆
◆	◆
◆	◆
◆	◆
◆	◆

5-17

Developing New Roles and Skills for Staff and Managers

Activity: Identify New Skills

- *With the same partner, identify the new skills needed by staff and managers within One-Stop Centers* (5 minutes).
- *Record findings on Activity Worksheet 5-B.*

5-18

New Staff and Manager Skills
(Activity Worksheet 5-B)

New "Staff" Skills	New "Manager" Skills
◆	◆
◆	◆
◆	◆
◆	◆
◆	◆
◆	◆
◆	◆

5-19

Choosing Processes to Improve

Criteria to Select High Priority Topics

- Needs attention (customer window).
- Has high customer value (customer window).
- Is cross functional.
- Impacts multiple funding sources.
- Impacts external customer.
- Can provide a quick win, especially if first experience using teams.

5-20

Choosing Processes to Improve

Activity: Select Topics for Team Problem Solving

- *Find a partner.*
- *Applying the selection criteria just described, spend 5 minutes to identify 3 topics that could be selected for team problem solving.*
- *Record findings on Activity Worksheet 5-C.*
- *Report out.*

5-21

Forming Continuous Improvement Teams

Criteria to Select Team Members

- Cross functional representation.
- Cross site representation.
- Multiple funding sources represented.
- Participants with different learning styles.
- No known conflicts/enemies among members.

5-22

Forming Continuous Improvement Teams
Continued

Criteria to Select Team, **Continued**

- Participation by at least one expert in team processes and continuous improvement tools.
- Participation by at least one expert in the content of the processes to be reviewed.
- Manageable number of team participants (8-10 total).

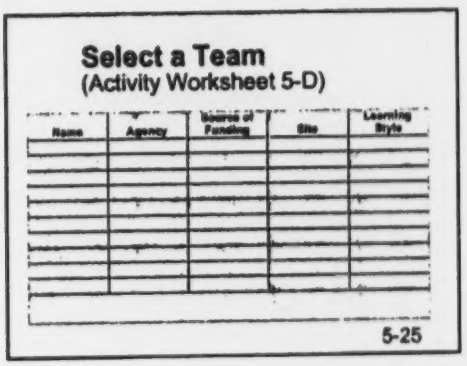
5-23

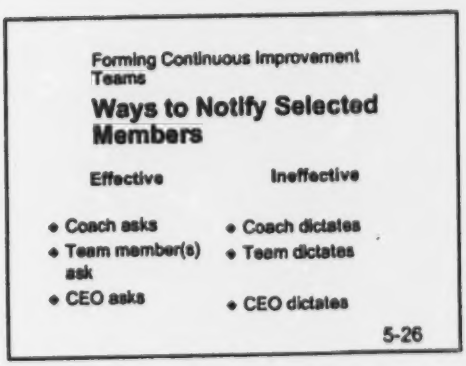
Forming Continuous Improvement Teams

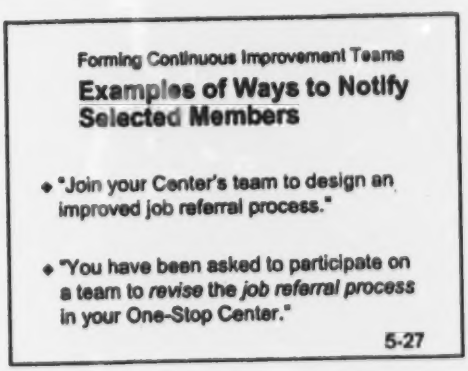
Activity: Select a Team

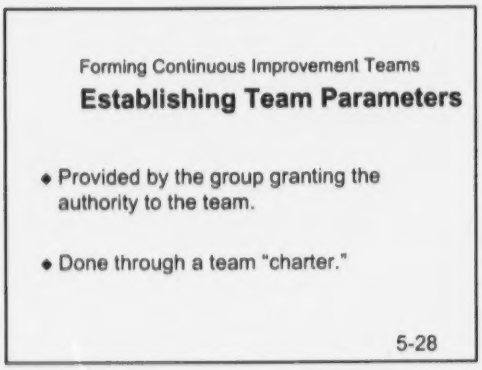
- *In this exercise, job referral and job placement services ("helping customers find a job") have been identified as the topic for a local improvement team.*
- *Using the criteria, determine the 8-10 members that you will charter for this team. Record the selected members on Activity Worksheet 5-D.*

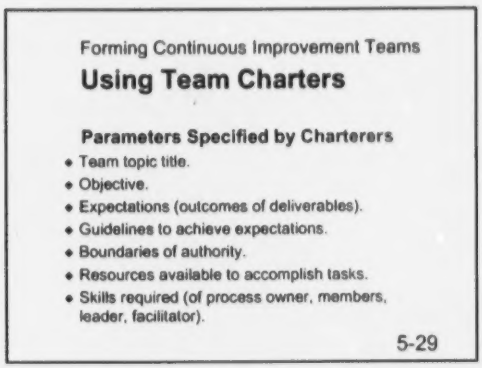
5-24

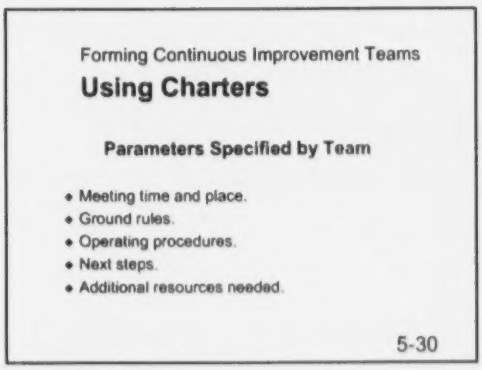

Select a Team
(Activity Worksheet 5-D)
Name
Agency
Source of Funding
Site
Learning Style
5-25


Forming Continuous Improvement Teams
Ways to Notify Selected Members
Effective
Ineffective
Coach asks
Team member(s) ask
CEO asks
Coach dictates
Team dictates
CEO dictates
5-26


Forming Continuous Improvement Teams
Examples of Ways to Notify Selected Members
"Join your Center's team to design an improved job referral process."
"You have been asked to participate on a team to revise the job referral process in your One-Stop Center."
5-27


Forming Continuous Improvement Teams
Establishing Team Parameters
• Provided by the group granting the authority to the team.
• Done through a team "charter."
5-28


Forming Continuous Improvement Teams
Using Team Charters
Parameters Specified by Charterers
• Team topic title.
• Objective.
• Expectations (outcomes of deliverables).
• Guidelines to achieve expectations.
• Boundaries of authority.
• Resources available to accomplish tasks.
• Skills required (of process owner, members, leader, facilitator).
5-29

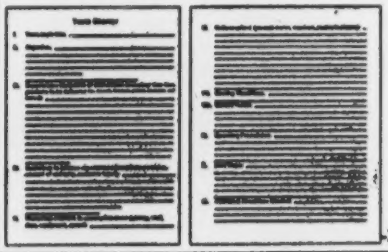

Forming Continuous Improvement Teams
Using Charters
Parameters Specified by Team
• Meeting time and place.
• Ground rules.
• Operating procedures.
• Next steps.
• Additional resources needed.
5-30

Activity: Practice Establishing Team Parameters

- *Working in your Center teams, determine the team parameters that you will give to your "job referral process" team* (15 minutes).
- *Complete parts 1 through 6 of the Team Charter format found in Activity Worksheet 5-E.*
- *Report out.*

5-31

Team Charter
(Activity Worksheet 5-E)



5-32

Components of a System

- ***Activity***: Steps or tasks in the execution of a process.
- ***Process***: A series of interrelated activities that lead to a desired outcome.
- ***System***: A set of interrelated and interdependent processes that are managed and have a specific purpose.

5-33

Components of a System

Key Elements of a Process

- Has distinct start and end points.
- Takes inputs, transforms/adds value to them, and delivers output to internal or external customer.
- Includes actions that are:
  - Definable
  - Predictable
  - Repeatable
  - Measurable
- Fulfills a specific purpose that adds value for a customer.

5-34

Components of a System

One Stop System Components

At your tables, identify as many examples as possible of your One Stop's:

- *Activities.*
- *Processes.*
- *Systems.*

Report out.

5-35

Document Your Current Approach to Improving One-Stop Services

- *Individually answer the questions on Activity Worksheet 5-F* (5 minutes).
- *Working with your One-Stop team, come to consensus on each answer* (15 minutes).
- *Draw a picture indicating the effectiveness of this approach to improving One-Stop Services* (5 minutes).
- *Report out.*

5-36

Document Your Current Approach to Improving One-Stop Services
(Questions Covered on Activity Worksheet 5-F)

1. How does your One-Stop center or system (or your program) measure success?
2. How does your One-Stop center or system (or your program) identify issues/problems?
3. How is a specific problem solved?
4. How are decisions made in the One-Stop center/system (or your program)?

5-37

Dynamic Process Improvement Method or DPI

- Outlined by Bill Montgomery in the book *Power Up Teams.*
- Developed by studying the natural stages that teams use to describe and streamline work flows.
- Simple to understand and use.
- Generic: learn the stages of DPI and all other continuous improvement methods fit into this one.

5-38

Dynamic Process Improvement Method or DPI

Stages of Dynamic Process Improvement

- Stage 1 - Scope
- Stage 2 - Flow
- Stage 3 - Customer/Supplier
- Stage 4 - Issues
- Stage 5 - Cause
- Stage 6 - Solution

5-39

Dynamic Process Improvement Method or DPI

Stages of Dynamic Process Improvement, Continued

- Six **stages** (not steps): going back is appropriate if it enhances going forward.
  - Stage = a place to be.
  - Step = continual progression.
- Stages are dynamic: you learn and take action at each stage.
- You may return to any stage: returning is a positive thing.

5-40

Dynamic Process Improvement Method or DPI

Stages of Dynamic Process Improvement, Continued

- Cycling back manages the learning and adds clarity.
- The first 3 stages are used to describe current process features and document system requirements.
- The last 3 stages are used to select and solve identified problems.

5-41

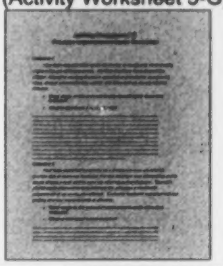
Dynamic Process Improvement Method or DPI

Activity: Identify Stages in The Improvement Cycle

- *At your table, review the scenarios presented on Activity Worksheet 5-G.*
- *Determine what part of the process improvement cycle this indicates.*
- *Determine the next stage in the process.*
- *Report out in 10 minutes.*

5-42

Identify Stages in the Process Improvement Cycle
(Activity Worksheet 5-G)



Activity Worksheet 5-G describes four scenarios.

For each scenario, determine:

What stage in this process improvement cycle does this indicate?

What is this team's next activity?

5-43

Dynamic Process Improvement Method or DPI

Process Improvement Tools: Reasons They are Used

- To improve the efficiency of manual operations.
- To uncover patterns, inconsistencies, difficulties, successes and possibilities.
- To carry ideas and information.
- To visually display team findings, constructions, and results.

Described in *Power Up Teams* by Bill Montgomery

5-44

Dynamic Process Improvement Method or DPI

Activity: Practice Process Improvement Tools

- *Work in teams to complete exercises in Activity Worksheet 5-H using:*
  - Pareto diagrams.
  - Run charts.
  - Scatter diagrams.
  - Fishbone charts.

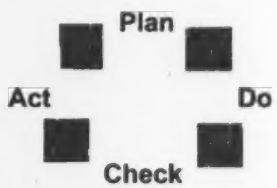
5-45

Steps in Improving Processes

- Implementing process improvements requires the use of a cycle of interrelated steps:
  - Plan.
  - Do.
  - Check.
  - Act.
- Repetitions of this cycle are used to stabilize processes and eliminate gaps.

5-46

Steps in Improving Processes



5-47

Steps in Improving Processes

"Plan"

- Select problem or process.
- Describe the process flow.
- Describe various causes and identify the root cause.
- Develop a solution.

5-48

Steps in Improving Processes

Typical Tools Used in "Plan" Step

Activity	Typical Tools
• Select problem or process.	• Brain storming, affinity diagram, data displays.
• Describe the process flow.	• Column or basic flow chart, tree diagram.

Described in *Power Up Teams* by Bill Montgomery.

5-49

Steps in Improving Processes

Typical Tools Used in "Plan" Step, Continued

Activity	Typical Tools
• Describe various causes; identify the root cause.	• Affinity diagram, cause and effect diagram, inter-relationship digraph, data displays.
• Develop a solution.	• Flow charts, activity network diagram, prioritization matrix, matrix diagram, tree diagram.

Described in *Power Up Teams* by Bill Montgomery.

5-50

Steps in Improving Processes

Typical Tools Used in "Do" Step

Activity	Typical Tools
• Implement the solution.	• Flow charts, activity network diagram, data displays.

Described in *Power Up Teams* by Bill Montgomery.

5-51

Steps in Improving Processes

Typical Tools Used in "Check" Step

Activity	Typical Tools
• Evaluate the solution.	• Check sheets, data displays, flow charts.

Described in *Power Up Teams* by Bill Montgomery

5-52

Steps in Improving Processes

Typical Tools Used in "Act" Step

Activity	Typical Tools
• Reflect and act on learning to stabilize system at improved level or make new changes.	• Affinity diagram, radar chart, brainstorming.

Described in *Power Up Teams* by Bill Montgomery

5-53

One-Stop Continuous Improvement Case Study

- *Working with your table, read the case study that is handed out to you.*
- *Determine key points about the case study.*
- *Prepare a presentation about those key points.*
- *Report out.*

5-54

Continuous Improvement Case Study

Debriefing

- How was continuous improvement utilized?
- What lessons were learned?
- What worked well?
- What were the "pitfalls"?
- What support was given? By whom?
- What needed improvement in using the continuous improvement process?
- What similarities did you find among all case studies?
- What was unique to each?

5-55

Summary: Using Continuous Improvement in a One-Stop System

- Focus on understanding and improving *internal* and *external* customer processes.
- Focus on One Stop *collaborative* process.
- Use with a newly reengineered process to keep it current.

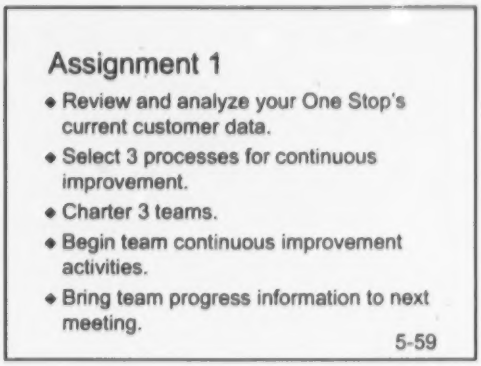
5-56

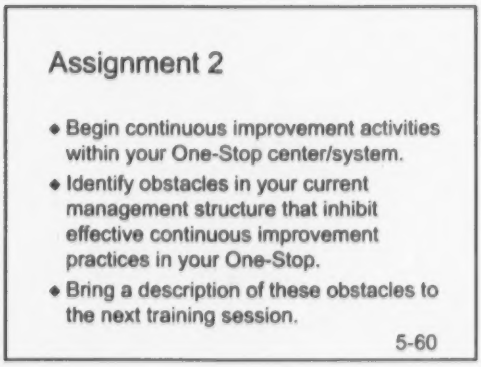
Activity: Using Continuous Improvement in Your One-Stop

- *Discuss how your local One-Stop team can use continuous improvement approaches and tools to make your operations more effective and efficient.*
- *Determine your next steps to implement continuous improvement in your One-Stop system.*
- *Report out.*

5-57

Homework Assignments
5-58


Assignment 1
• Review and analyze your One Stop's current customer data.
• Select 3 processes for continuous improvement.
• Charter 3 teams.
• Begin team continuous improvement activities.
• Bring team progress information to next meeting.
5-59


Assignment 2
• Begin continuous improvement activities within your One-Stop center/system.
• Identify obstacles in your current management structure that inhibit effective continuous improvement practices in your One-Stop.
• Bring a description of these obstacles to the next training session.
5-60

Techniques and Tools

5-61

Tools Referred to in Module 5

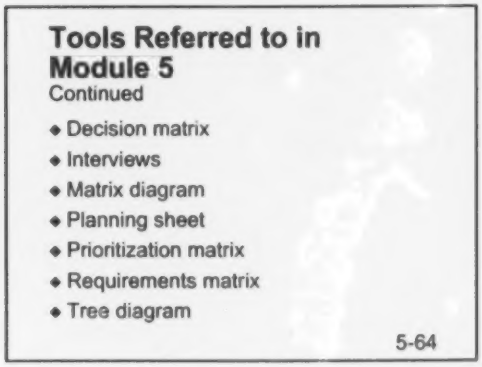
- Affinity diagram
- Activity network diagram
- Basic data display tools:
  - Bar chart
  - Pareto Diagram
  - Pie chart
  - Run chart
  - Radar chart
  - Histogram

5-62

Tools Referred to in Module 5
Continued

- Brainstorming
- Cause and effect diagram
- Check sheets
- Customer-process-supplier model
- Flow Charts
  - Basic flow chart
  - Column flow chart
  - Analysis tools for flow charts

5-63


Tools Referred to in Module 5
Continued
• Decision matrix
• Interviews
• Matrix diagram
• Planning sheet
• Prioritization matrix
• Requirements matrix
• Tree diagram
5-64

SPR SOCIAL POLICY RESEARCH ASSOCIATES

Partnering for Quality under the Workforce Investment Act:
A Tool Kit for
One-Stop System Building

Activity Worksheets

Module 5

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Activity Worksheet 5-A
Identify New Roles for Staff and Managers Within One-Stop Centers

1. Find a partner.
2. Spend 5 minutes identifying new roles for staff and managers within One-Stop centers.
3. Record findings below.

New "Staff" Roles	New "Manager" Roles

Activity Worksheet 5-B
Identify New Skills Needed by Staff and Managers Within One-Stop Centers

1. Find a partner.
2. Spend 5 minutes identifying new skills needed by staff and managers within One-Stop centers.
3. Record findings below.

New "Staff" Skills	New "Manager" Skills

Activity Worksheet 5-C
Apply Criteria for Selecting High Priority Topics

We use the following criteria for selecting topics for continuous improvement:

- Needs attention.
- Has high customer value.
- Is cross functional.
- Impacts multiple fundings sources.
- Impacts external customer.
- Can provide a quick win, especially if first experience using continuous improvement teams.

1. Find a partner.
2. Spend 5 minutes identifying three topics that could be selected for team problem solving, applying these selection criteria.
3. Record findings below:
4. Report out findings.

_____
_____
_____
_____
_____
_____
_____
_____

Activity Worksheet 5-D
Select a Team

1. Work with the members of your local partnership.
2. The need for a local improvement team has been identified.
3. The topic of the team has been identified as job referral and job placement services ("helping customers find a job").
4. Determine the 8 to 10 members that you will charter for this team. Use the criteria shown on slides 5-22 and 5-23.

Name	Agency	Source of Funding	Site	Learning Style

Activity Worksheet 5-E

Team Charter

I. Team topic title:

II. Objective:

III. Expectations (outcomes of deliverables including: time line, products to be delivered e.g., manuals, flowcharts, policies, procedures, staff training):

IV. Guidelines to achieve expectations (established policies, amount of authority, customer input):

V. Resources available to accomplish tasks (money, staff, time, equipment, space):

VI. Skills required (process owner, members, leader, facilitator):

VII. Meeting Time/Place:

VIII. Ground Rules:

IX. Operating Procedures:

X. Next Steps:

XI. Additional Resources Needed:

Activity Worksheet 5-F
Assessing Your One-Stop Center/System

1. How does your One Stop center/system (or your program) measure success? How does it know when it is doing well?

- Who (what staff, partners or board positions) decides if the center/system or program is successful? Doing well?
- When do they decide?
- How do they know it is?
- What do they use to determine it?
- What does the center/system or program do with the information?
- Do they talk to anyone about it? If so, who?

2. How does your One Stop identify issues/problems?

- Who decides what the issues and problems are?
- When do they decide it?
- How do they know that it is an issue/problem?
- What do they do with that information?
- Are they talking to anyone about it? If so, who?
- What are people's reactions to the identified issues and problems?

3. Looking at a specific issue/problem, how is the problem solved?

- Who is solving the problem?
- How does the One Stop decide who solves the problem?
- When are they doing it?
- What is the approach they use to solve it?
- What are they using to solve the problem?
- What types of materials/stuff is lying around?
- Is there conversation? If so, what does it look like? If not, what is happening?

4. How are decisions made in the One Stop?

- Who decides?
- How do they decide?
- When do they decide?
- Is it communicated to others? If so, to whom?
- How is it communicated?
- When is it communicated?
- Is the effectiveness of the decision measured? If so, by whom? How often?
- What happens if it is effective?
- What happens if it is not effective?

Activity Worksheet 5-G
Process Improvement Cycle Scenarios

SCENARIO 1

Your team has just been given its charter to revise and continuously improve the job referral process. All team members have studied the charter, helped to develop the team operational procedures and ground rules, chosen a facilitator and leader, and have defined the job referral process.

- **What stage in the process improvement cycle does this indicate?**
- **What is this team's next activity?**

_____
_____
_____
_____
_____
_____
_____
_____
_____

SCENARIO 2

Your team identified timeliness as a problem in your job referral process due to customer feedback that the employer was dissatisfied at the length of time it took staff to send job referrals to the employer. The team piloted some improvements to address the employer's timeliness requirement of receiving job referrals. Customer feedback indicates that the piloting of those improvements is effective.

- **What stage in the process improvement cycle does this indicate?**
- **What is this team's next activity?**

_____
_____
_____
_____
_____
_____
_____

SCENARIO 3

Your team has identified that the job referral process is not being done the same way in every site, nor with each separate interaction. This creates a question as to what is truly causing the customer dissatisfaction.

- **What stage in the process improvement cycle does this indicate?**
- **What is this team's next activity?**

SCENARIO 4

Your team has identified that the root cause of the timeliness issue of job referrals to employers is that all staff are busy all day long entering job applicants profiles in the computer system.

- **What stage in the process improvement cycle does this indicate?**
- **What is this team's next activity?**

Activity Worksheet 5-H
Practice Process Improvement Skills

Instructions

Step 1: Review the Process

Your organization has received feedback that its "XYZ" process is not satisfying to the customer. We will do one round of the "XYZ" process to ensure all members of the team understand the steps to the process.

Have your team stand up and space yourselves about 10 feet apart from each of the other team members. Choose one person to be recorder and one person to be time keeper/customer. Count off the remaining members so that each of the rest of you has a number in sequence. The trainer will give each member #1 an object that is considered "input." You will use that "input" and demonstrate your process by having member #1 throw the input to member #2, who will throw it to member #3, and so on until it has gone to each member, ending with an individual designated as the "customer."

Debrief Step 1

- How is this similar to processes in your organization?
- How is it different?

Step 2: Determine Some Possible Root Causes for Customer Dissatisfaction

Now that you have experienced the process, we want to follow the steps to try to improve this process. Therefore, we will begin by trying to determine some possible "root causes" for the customer dissatisfaction. We will use the *fishbone/cause and effect diagram* (see Cause and Effect Diagram under Summary of Tools) to determine those possible root causes. In your team, review the information on Fishbone/Cause and Effect Diagram in the Summary of Tools section of the Participant Workbook. Utilize the steps described for this tool to identify potential root causes.

- Define the effect (issue). Gather people that have knowledge about the effect to be studied.
- Brainstorm ideas about the possible causes for the effect. Please each idea on a card of post-it note.

Activity Worksheet 5-H
Practice Process Improvement Skills
Continued

- Build a fishbone. Place the effect on the right side of the diagram. Draw major cause categories or steps in the production process and connect them to the backbone of the fishbone chart.
- The four main branches (causes) in production are usually categorized as *people*, *materials*, *methods*, and *machines*. In a service process, *policies*, *procedures*, *plan*, and *people* can be used as branches. In both types, *environment* and *measures* are also frequently used. There is no perfect set or number of categoies for causes—make them fit the problem you are working on.
- Post each post-it note on one of the branches/sub-branches of the fishbone.
- Ask repeatedly of each major cause, "What is causing....?"
- For each of the causes on the bone ask, "Why does it happen?" List shose sub-causes.
- Review the causes by looking for those that, if addressed, may have the greatest impact. Gather data to determine the relative frequency of the potential root causes.
- Review the gathered data to determine the potential causes to address.

Debrief Step 2

- Do we KNOW the root cause?
- What do we need to do next?

Step 3: Gathering Additional Data to Make Continuous Improvement Decisions

Each team will now run a series of processes around which they will gather the necessary data to determine how stable the process is and what in the process may be causing the customer dissatisfaction. The following chart has space to record the key features of your process.

The recorder will utilize the flip chart and record the data as listed on the Cycle Time Chart. The team will toss the input around completely approximately 50 times. The timekeeper/customer will time the cycle using the stopwatch. After

Activity Worksheet 5-H
Practice Process Improvement Skills
Continued

each complete process cycle (the object goes from person #1 through to the customer), the recorder will document:

- The cycle time.
- The number and types of errors (drops, over-throws, mishaps).
- Any other observations about the cycle.

Periodically, the trainer will call "rotate" and each team will have at least two of its members change positions (e.g., member #1 becomes member #5, member #5 becomes member #2, etc.) In addition, there may be some cycles where the trainer adds some surprise to the toss.

Debrief Step 3

- How is this like your organization's processes?
- Does your organization have to respond to new materials/information/staff transition periodically? If so, what impact does it have on those processes?

Documentation of Process

Cycle (Toss) #	CycleTime	# of Errors	Types of Errors	Observations
1				
2				
3				
4				
5				
6				
7				
8				
9				
10				
11				
12				
13				
14				
15				
16				
17				
18				
19				
20				
21				
22				
23				
24				

Cycle (Toss) #	CycleTime	# of Errors	Types of Errors	Observations
25				
26				
27				
28				
29				
30				
31				
32				
33				
34				
35				
36				
37				
38				
39				
40				
41				
42				
43				
44				
45				
46				
47				
48				
49				
50				

Activity Worksheet 5-H
Practice Process Improvement Skills
Continued

Step 4: Using the Run Chart to Determine if Your Process is Stable

Using the following information and your data from the toss activity, create a run chart.

Run Chart

Purpose:

- To track trends over time.

When Used:

- Whenever data needs to be displayed in sequence to determine trends, changes, or variations.
- Before and after improvement in the process.
- When looking for program irregularities.

Why Useful:

- Monitors performance over time to detect trends, shifts.
- Allows teams to make comparisons before and after implementation of solutions.
- Focuses attention on vital changes.
- Provides visual comparison between performance and customer requirements.

How to Do It:

1. Determine the time intervals or the sequence numbers for the horizontal access.

Activity Worksheet 5-H
Practice Process Improvement Skills
Continued

2. Determine the highest value of the "cycle time data." Use that value to establish the highest scale value for the vertical axis.
3. Label both axes.
4. Plot the points.
5. Connect the points to create a line chart.

Debrief Step 4

- Does your process vary over time?
- Is the amount of variation decreasing? Increasing?

Step 5. Use a Pareto Chart to Rank Order your Processes

Using the following information and your data from the toss activity, create a Pareto chart. (See Pareto Chart under Summary of Tools in the Participant Workbook.)

- Choose a problem to explore.
- Choose the causes that will be monitored/compared/rank ordered.
- Choose the most meaningful unit of measurement (frequency of errors).
- Choose the time period for the study.
- Gather data for each cause category.
- Compare the causes using the meaningful unit of measure for each (frequency).
- Create the chart—list the cause (in descending order) on the horizontal axis and create a bar above each cause up to the measurement on the vertical axis (frequency of errors) experienced in connection with each cause.

Activity Worksheet 5-H
Practice Process Improvement Skills
Continued

Debrief Step 5

- What were your team's key problem areas?
- What problem(s) would you address first in trying to improve customer satisfaction with this process?

Step 6: Use a Scatter Diagram to Show the Relationship Between Variables in Your Process

Using the data from your process cycles and the information below, draw a Scatter Diagram showing the relationship between "errors" and "cycle time." (See Scatter Diagram under Summary of Tools in the Participant Workbook.)

- Collect 50 to 100 paired samples of data on two variables the team believes to be related (e.g., height of toss or distance between tosser and catcher and error rate).
- Prepare a data sheet as follows:
  - Prepare a chart with a vertical and horizontal axis.
  - Plot each data pair with the expected cause on the horizontal axis and the effect on the verical axis.
  - If data points are duplicated, circle that point as many times as necessary to indicate the number of observations it represents.
  - The closer the chart is to a straight line, the stronger the (linear) relationship, and the greater the likelihood that a change in one will effect a change in the other variable.

Debrief Step 6

- What did you use as the "cause" (horizontal axis)?
- What did you use as the "effect" (vertical axis)?
- Does your scatter diagram support your hypothesis of a cause/effect relationship?

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SPR SOCIAL POLICY RESEARCH ASSOCIATES

Partnering for Quality under the Workforce Investment Act:
A Tool Kit for One-Stop System Building

Case Studies

Module 5

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CASE STUDY EXAMPLE

MODULE 5. BUILDING A PROCESS FOR CONTINUOUS IMPROVEMENT

NORTH CENTRAL INDIANA PRIVATE INDUSTRY COUNCIL

INTRODUCTION

Located in mid-north Indiana, the North Central Indiana Private Industry Council (NCIPIC) is responsible for the workforce development services for youth, adults, older workers, dislocated workers, food stamp and welfare recipients, and single parents/displaced homemakers. A variety of funding sources supports the design, oversight, policy development and direct provision of those services. Its six county rural service delivery area has agriculture and automotive manufacturing as its two major industries. Although continuous improvement, customer satisfaction and quality management are well known within the automotive industry, these terms and practices have not spread through many of the other small businesses, education, not-for-profit and governmental agencies in the area. This was especially true in 1992 when the NCIPIC began its organizational transformation from a traditional organization to a business oriented to high performance, customer focus, continuous improvement, and quality management.

This case study describes two aspects of how NCIPIC built a process for continuous improvement. The first section describes how the organization made the organizational changes necessary to support a continuous improvement process. The second section describes how NCIPIC has implemented the continuous improvement tools to shape its business practice.

ORGANIZATIONAL TRANSFORMATION

In 1992, NCIPIC has a traditional management approach. Decisions were made only by top management—who were far removed from those receiving the services. Changes in program design were made only periodically and usually with a large price tag attached for system redesign. Finally, NCIPIC staff were not required to use the problem solving, critical thinking and teamwork skills in their jobs that they were requiring their participants to gain to be "job ready."

Three major issues prompted the NCIPIC's quality journey in 1992. The first was the need to expend $80,000 to upgrade the assessment/case management systems, and the belief

that—unless the organization embraced problem solving through continuous improvement—a similar expenditure for system upgrading would be required again within the next year. The second prompter was the belief that the organization's traditional approach to management would no longer allow the organization to meet its performance measures. The third reason to change the NCIPIC corporate culture was the belief that the definition of success in the employment and training system had moved from *compliance*, to *great customer service* and would soon be moving to *true customer satisfaction*.

The NCIPIC developed a 4-phase approach to becoming a "high performance organization." This planned approach to organizational change included: (1) a *leadership* transition, (2) an *individual* transition, (3) a *systems* transition, and (4) a *vendor/supplier* transition.

The first phase, leadership transition, was intended to teach the management staff the new skills required:

- To be coaches and mentors (instead of "bosses").
- To be decision causers (instead of decision makers).
- To set the new vision/definition/principles/ strategies and tools of quality.
- To establish the process to change the culture.,
- To define the organization's customer(s) and their requirements.
- Tto assess the organization's current quality.
- To identify the processes to be improved.
- To establish/charter continuous improvement teams.

The second phase of planned organizational change, individual transition, allowed staff to learn new skills necessary:

- To work in a high performance organization.
- To practice working in teams.
- To go through one cycle of continuous improvement within those teams and benchmark their progress.
- To learn/practice new tools for continuous improvement.
- To collectively identify new corporate values.
- To begin to communicate horizontally with other teams within NCIPIC.

The change in staff and the new corporate values in Phase 2 prompted major change in three of the organization's systems. This began Phase 3 of the organization's transition. The systems that needed immediate attention to support the new corporate values included the personnel system, the communication system, and the quantification system. First to be addressed was the personnel system—including job descriptions, hiring practices, and staff performance development/evaluation. With the new communication between teams, and the empowerment of front-line staff, the communication system started readjusting. The most critical system change included changes in the practice of collecting, analyzing and utilizing customer feedback to improve service design and delivery.

Phase 4 was the transition of the vendors/suppliers for the NCIPIC. In order to ensure that customers are satisfied, changes were made to ensure that the procurement, selection, negotiation with, and evaluation of service providers would now include review of the continuous improvement processes within their organization. Also, soon to be reviewed and analyzed was the level of customer satisfaction they achieve.

In summary, in order to remain a viable business for the workforce system in north central Indiana, the NCIPIC began its quality journey. Its four-phased approach included leadership, individual, system and vendor/supplier transitions. These phases incorporated team chartering and development; learning and practicing tools to help the organization and teams plan for improvements, applying critical thinking skills to solve problems, implementing solutions to problems, and reviewing the impact of—as well as planning for—the next continuous improvement cycle. This approach has helped the organization achieve a customer satisfaction score of over 93%, and set ever-increasing goals for success. In the process the way the organization has defined success has moved from regulatory compliance, to high-quality customer service, and then to true customer satisfaction ("surprising and delighting the customer.")

BUILDING A CONTINUOUS IMPROVEMENT PROCESS

In order to determine which process(es) to begin to improve, the organization's leaders first began by identifying the organization's products and services and customers for each of those products/services. As a part of an analysis of the service delivery process, different service "functions" were identified. Some of those functions included interviewing, assessment, training, and job matching. The NCIPIC determined that additional data was needed around the requirements for each of those functions—specifically, what staff behaviors would result in a function being delivered in a high quality manner resulting in high customer satisfaction. Once those behaviors were identified, they were used as minimum requirements

to which operations data were compared. This was done to determine 1) how well the NCIPIC was meeting the needs of its customers, 2) which functions needed the most improvements, 3) what functions were the most stable, and 4) what functions were being delivered in a manner that most closely met the customers' requirements. After 6 months of collecting data, Pareto charts of the data for each function were reviewed/analyzed. Using this data, the NCIPIC quality council selected three of the functions to be improved. The criteria used in selecting the three functions for improvement included the following:

- The function(s) had to be applicable within all the funding sources of the One Stop.
- One of the functions to be improved had to be in such disarray as to be a frustration point for the staff.
- One of the functions had to be able to be improved quickly to demonstrate to staff that this approach is valuable.

The three chosen functions were procurement, individual service strategy development, and orientation. A process improvement team was established for each of these functions. Team members were trained on their responsibilities to improve the function's process and were given the necessary resources and tools to accomplish their mandate to make improvements to that function's process. Below we describe the activities of the procurement process improvement team.

Experiences of the Procurement Process Improvement Team

The first step of the team was to define the process they were supposed to improve. Due to the broad-based definition of procurement, the team broke this large process down into manageable sub-process pieces. They began with the sub-process of JTPA Summer Youth IIB timecards and payroll. Once this sub-process was selected, the team flowcharted the steps in this process. The flow chart began with the step (input) of giving the youth the blank timecard to be completed and ended with the final step (output) of a payroll check being delivered to the youth.

The team then reviewed the process across all six of the county offices to determine if the process was "stable" (i.e., whether the *actual* process steps matched those in the flowchart of how the process is supposed to work). After determining that the process was within an acceptable range for being considered stable, the team determined that they wanted to improve the ability of the process to meet the customers' requirement that the payroll checks be 100% accurate, each and every time. This required the team to gather data to determine what was

the root cause of *inaccurate* payroll checks. The team decided to use a check sheet to gather information about the types and frequency of errors that resulted in inaccurate payroll checks.

At the end of the predetermined time to collect the data, the team used a Pareto chart to plot the frequency and types of errors related to inaccurate payroll checks. Review of the Pareto chart indicated that the majority of the inaccurate payroll checks resulted from timecards being completed inaccurately by the youth. The team then brainstormed solutions to decrease/eliminate the inaccuracies on the timecards. They initially determined that they would use timecard completion as a training module for the summer youth *job keeping skills* curriculum. The team designed a curriculum module for the summer youth trainers and gave the curriculum to the trainers to begin using. The trainers began to train the summer youth using this curriculum. After several weeks, little improvement around the process was seen by the team.

New brainstorming led the team to realize that instead of approaching the inaccurate time card completion from a customer's viewpoint, they had approached it from the staff's viewpoint. Instead of changing the process to meet the customer's needs, staff had tried to change the customers to meet the current process that had been established! (Instead of trying to make the time card simpler, more customer friendly, or somehow eliminating a timecard altogether, they had tried to make the customer change to meet the needs of the system!)

The next solution that the team agreed upon was to talk to the customers and determine what would make the timecard more user friendly and streamlined so that there was less opportunity for error. After talking with the customers, the team revised the timecard. Data revealed that this approach made a drastic improvement in the inaccurate timecards and also reduced the number of inaccurate payroll checks.

Once this new timecard process was stabilized, the team identified the next largest cause of inaccurate payroll checks and followed the same continuous improvement process cycle to eliminate that cause. This continuous improvement cycle continued until the team agreed that they had made enough improvements to move on to tackle a different sub-process within the procurement function.

In summary, the followed the continuous improvement cycle to make improvements in the procurement process. This cycle includes flowcharting the process, identifying if it is stable and stabilizing it as needed, identifying something to improve in the process, determining the root cause of the problem, discussing and choosing solutions to address the root cause, testing the solution, evaluating the effect, and changing it if necessary until the

correct solution is found and implemented. The team also learned the importance of focusing on the customer throughout the whole process so that the process is improved based upon customer needs instead of staff needs. The team learned to change the process to meet customer needs instead of trying to make the customer change to make the organization's process smoother/more efficient.